MT Votes January 2016 Release

2016 Election Administrator Certification Training

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Elections and Government Services

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Voter Registration

Resync Functionality

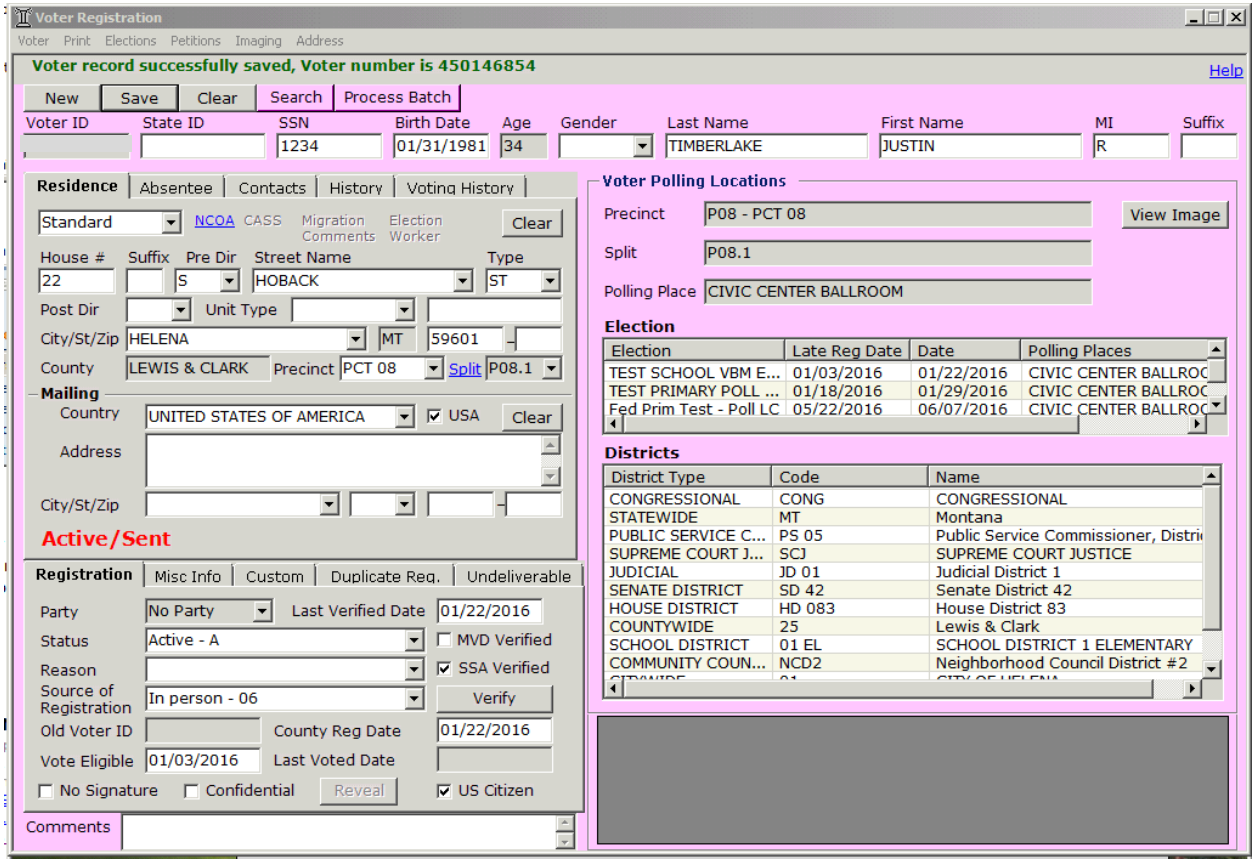
What is Resync:

- Information is "**in sync**" when it **agrees**.
- If you update a voter's information after they were issued a ballot for an election, the information on the voter's record ***dis***agrees with the information that was used to create the voter's ballot. The new information is **not in sync** with the ballot information for the election.
- A "**resync**" applies the voter's new information to the election, by creating a new ballot for that voter.

Resync Functionality

What is Resync:

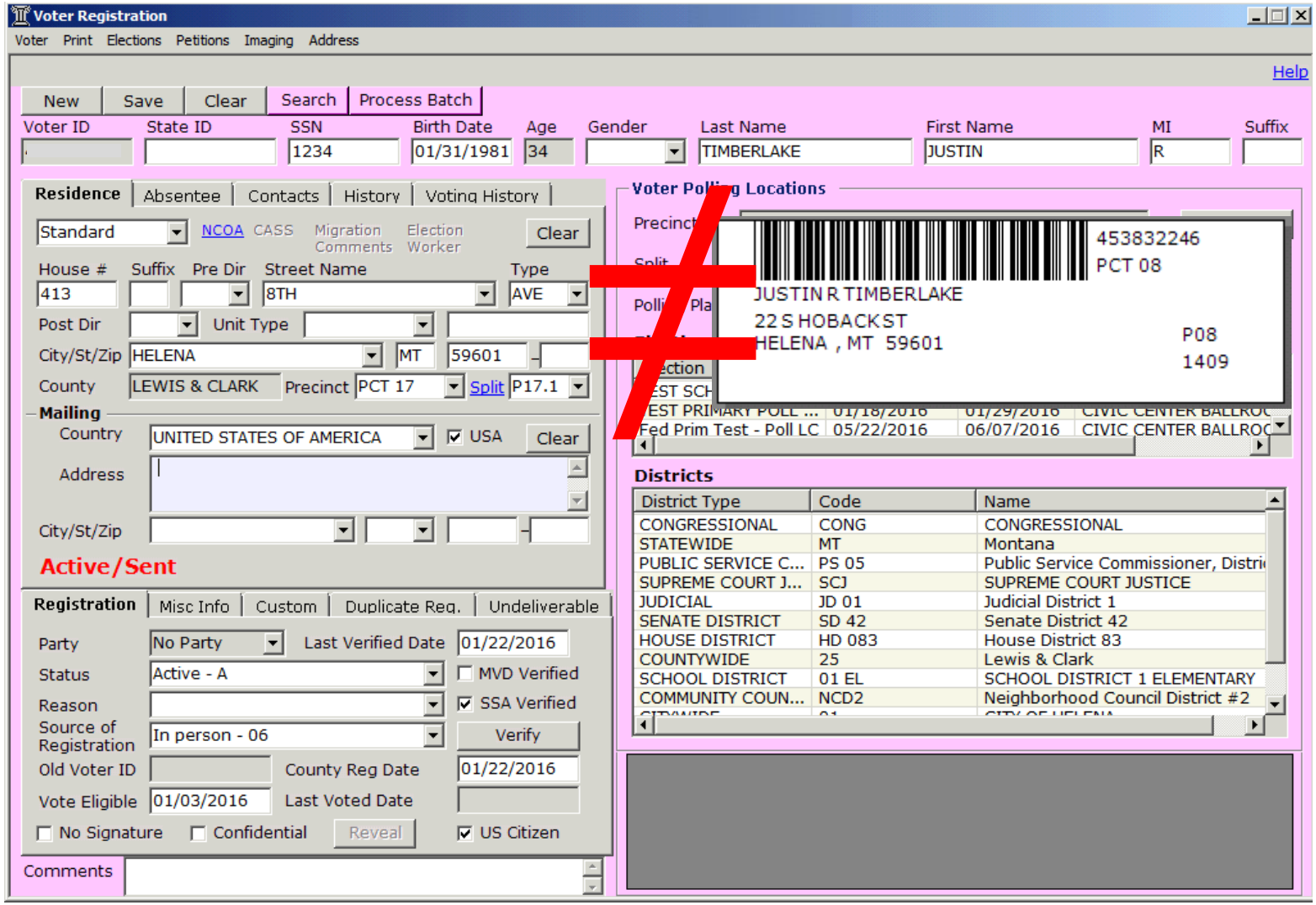
Voter Information



Ballot Information

Resync Functionality

What is Resync:



Resync Functionality

Resync Issue:

- Previously, a lot of resyncs happened behind the scenes in MT Votes.
- Sometimes these resyncs resulted in a voided ballot, even though the user did not intend to void a ballot.

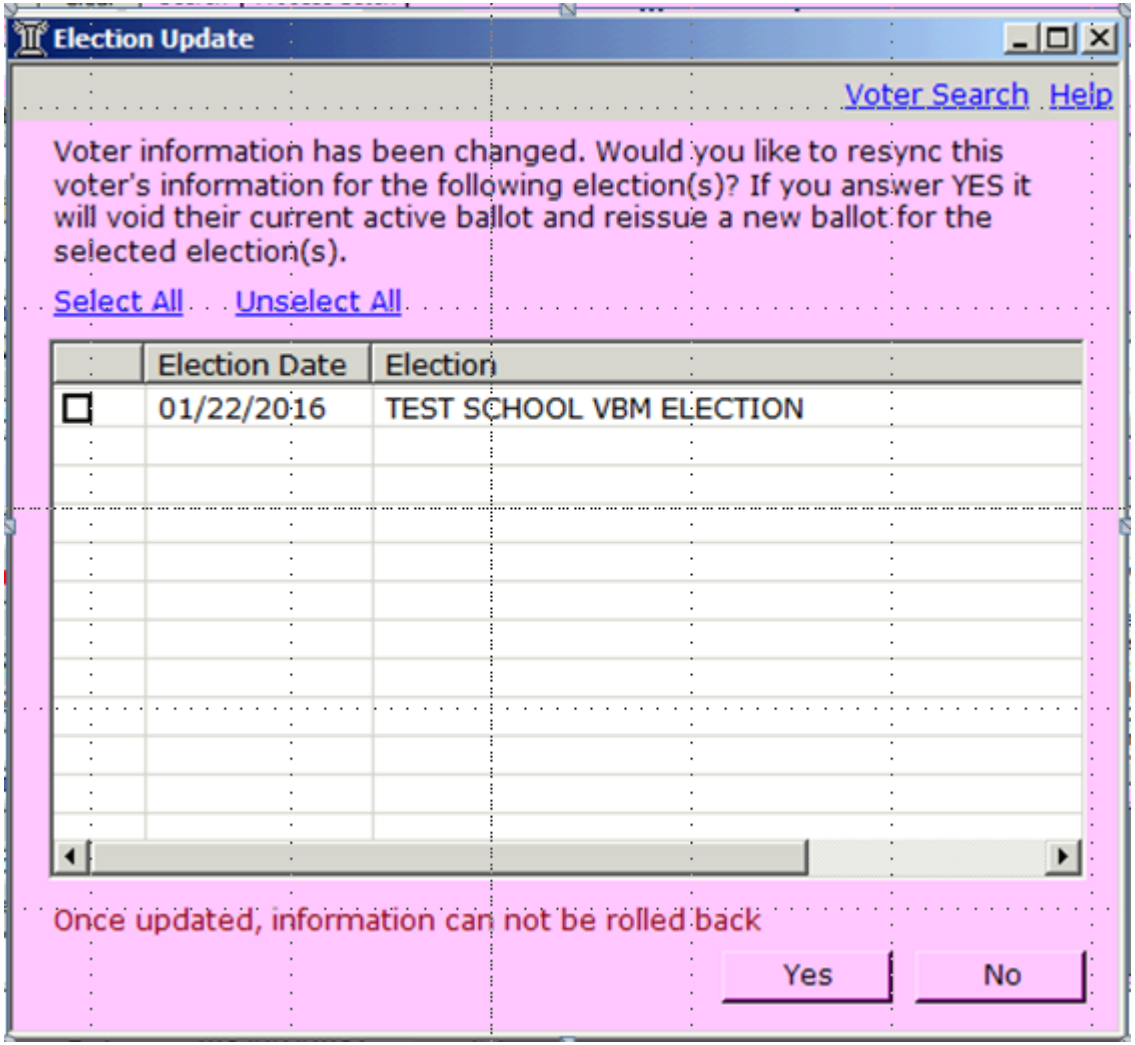
Resync Functionality

Resync Solution:

Recent enhancements to MT Votes give you more control over the resync. On your end, you will see a resync pop-up box, asking if you would like to resync the voter's information for one or more elections.

Resync Functionality

What's the pop-up look like?:



Resync Functionality

When will the resync box pop?:

Whenever you update a voter's key information (name, residence, mailing address, absentee address), AND the voter has a ballot in one of the following stages:

- Sent
- Undeliverable
- Resent
- Void

Resync Functionality

When does the resync not pop?:

The voter does not have a ballot for any election, or the voter's ballot is in one of the following stages:

- Prepared*
- Accepted
- Rejected

*If a voter has a prepared ballot and you update that voter's key information, the prepared ballot will automatically be updated with that information.

Resync Functionality

Other thoughts on Resync…

I think of the resync pop-up appearing anytime you have already *issued* the voter a ballot for an ongoing election, and you change information on that voter's record that you may or may not want to apply for the ongoing election.

Resync Functionality

How do I know if I want to Resync?

- If you need to void the voter's ballot and reissue a new one, the answer to the Resync is

  YES

- If you do not want to void the voter's ballot and reissue a new one, the answer to the Resync is

  NO

Questions to Consider before Answering Yes or No to Resync

- What type of application did I receive?
  - Voter Registration Card
  - Absentee Request
  - Undeliverable Confirmation Notice
- Who did I receive the application from?
  - Regular Registrant
  - Late Registrant
  - UOCAVA registrant
- When did I receive the application?
  - Before or after the close of registration
  - Before or after the deadline to issue absentees
- How did I receive the application?
  - In person
  - By mail
  - Other
- What type of information is changing?
  - Residence address change (must be made in person after the close)
  - Mailing/absentee address change

Resync Functionality

Scenario 1:

- It is before the close of registration for a Fire District Election. Your judges are stuffing ballots for the election, which means you have printed labels in MT Votes and ballots are in Active/Sent stage. (Just in MT Votes, you have not actually sent ballots to voters yet.)
- You receive a registration card from one of the voter's in the Fire District. The registration card indicates a new residence address.
- Do you answer Yes or No to the resync?

Resync Functionality

Scenario 1 Solution:

- YES
- You would answer Yes to the resync because you received the registration card before the close of regular registration.
- Note: the judges are already stuffing a ballot for this voter under the voter's old information. That ballot will have to be pulled out and voided.

Resync Functionality

Scenario 2 :

- It is past the close of regular registration for the School Mail Ballot Election you are conducting.
- You receive a card in the mail with a residence address change for a voter who was already sent a school ballot at their old residence.
- Do you answer Yes or No to the resync?

Resync Functionality

Scenario 2 Solution:

- NO
- Because it is past the close of regular registration for the school election, and this voter did not appear in person to late register for the school election, the address update may only be applied to future elections.
- Note: You may want to attempt to contact the voter to give them options for voting in the school election.

Resync Functionality

Scenario 3 :

- We are in the period of late registration for a School Mail Ballot Election that our office is conducting. A temp gets the resync pop-up and asks what to do.
- You find out that the voter came in with a voted ballot for the school election, sealed in the signed affirmation envelope. The voter was working with your temp to update their residence address to make sure it is correct for the Primary.
- Do you answer Yes or No to the Resync?

Resync Functionality

Scenario 3 Solution :

- It depends.
- In this case, I would give the voter the option to return the voted ballot they brought in, or get a new school ballot under their new address.
- Voter requests new ballot under new address:
  - Yes to resync
  - Note: You would take the ballot they brought in and mark it void. The voter's status would be late registration for the school election.
- Voter wants to use the ballot they already voted:
  - No to resync
  - Note: Since the voter was not updating their address and getting a ballot for the school election, they are not a late registrant. They are updating their registration as a regular registrant for the next election.

Resync Functionality

Scenario 4:

- A ballot for a vote by mail election comes back undeliverable. The voter returns the undeliverable confirmation notice, indicating a new residence address.
- Do you answer YES or NO to the Resync?

Resync Functionality

Scenario 4 Solution:

- NO
- In this case, you would reSEND the ballot to the voter through the issue ballots screen.

Voter Registration

Situation:

With the passing of HB84 the Secretary of State is required to prescribe a form that can verify an elector's late registration status for a school election.

In discussion with METAC we designed the Certificate of Late Registration, which is available in MT Votes. This was actually implemented in the September METAC release, and updated in this release.

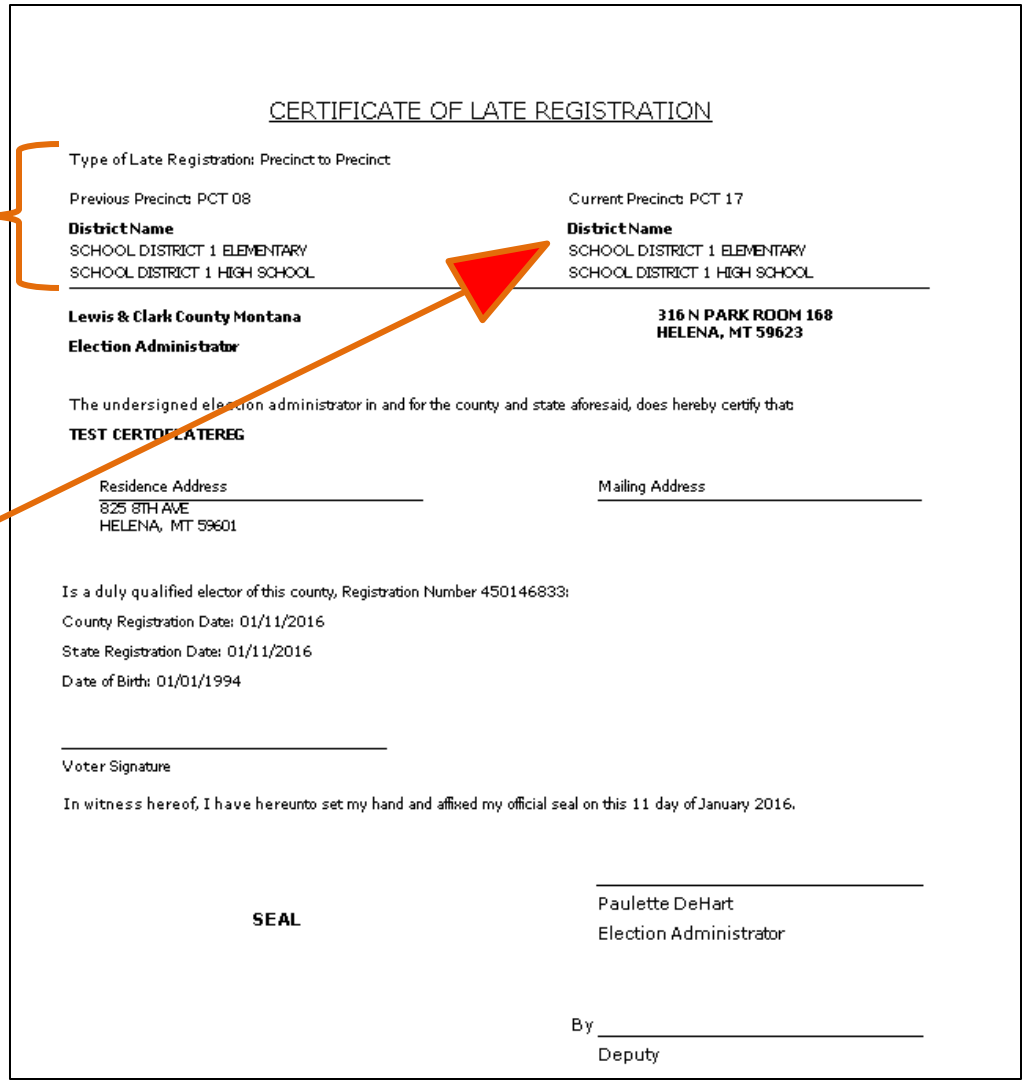
Voter Registration

Changes:

The biggest changes to this form were to include:

- Type of Late Registration
- Previous County/Precinct
- Previous School District information
- New School District information

You can only print this certificate if the voter is in Late Registration status. It is available from the voter record in the Print menu.



CERTIFICATE OF LATE REGISTRATION

Type of Late Registration: Precinct to Precinct

Previous Precinct: PCT 08

District Name
SCHOOL DISTRICT 1 ELEMENTARY
SCHOOL DISTRICT 1 HIGH SCHOOL

Current Precinct: PCT 17

District Name
SCHOOL DISTRICT 1 ELEMENTARY
SCHOOL DISTRICT 1 HIGH SCHOOL

Lewis & Clark County Montana
Election Administrator

316 N PARK ROOM 168
HELENA, MT 59623

The undersigned election administrator in and for the county and state aforesaid, does hereby certify that:

TEST CERTOFLATEREG

Residence Address
825 8TH AVE
HELENA, MT 59601

Mailing Address

Is a duly qualified elector of this county, Registration Number 450146833:

County Registration Date: 01/11/2016

State Registration Date: 01/11/2016

Date of Birth: 01/01/1994

Voter Signature

In witness hereof, I have hereunto set my hand and affixed my official seal on this 11 day of January 2016.

SEAL

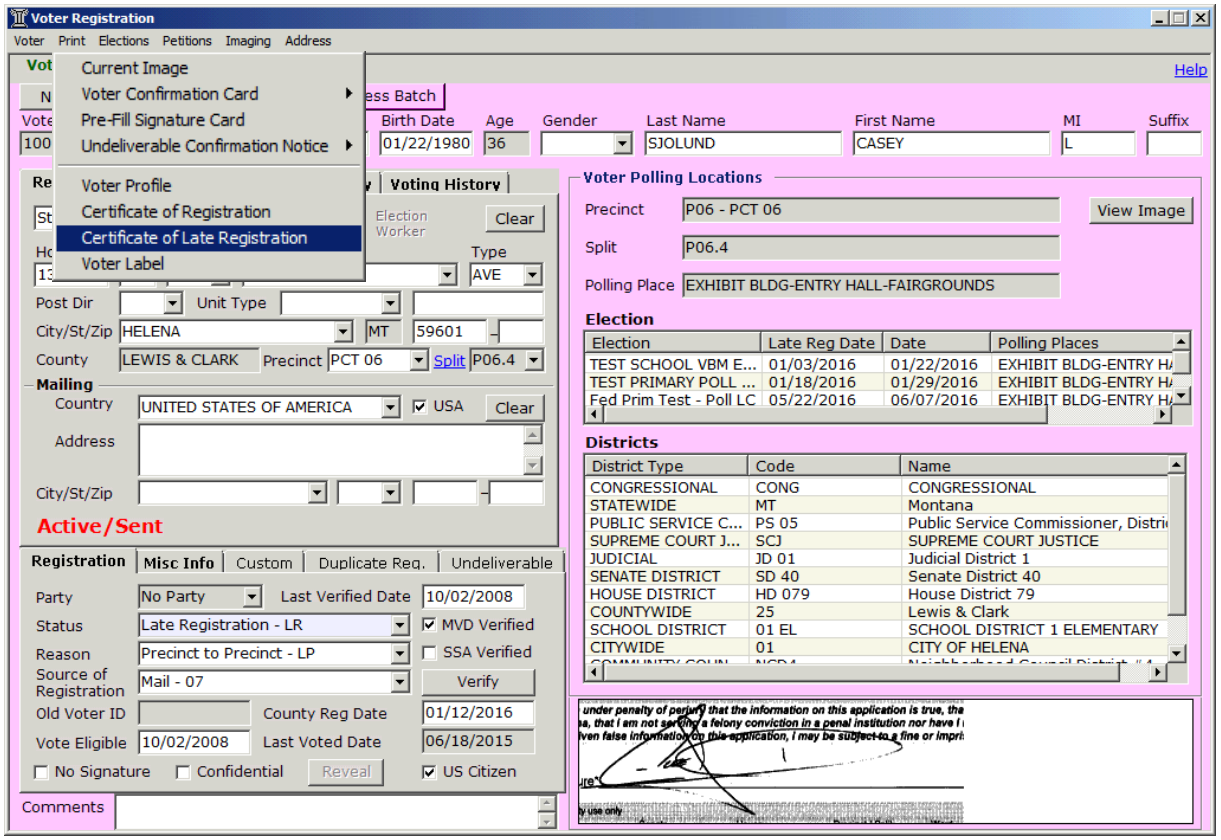
Paulette DeHart
Election Administrator

By _____
Deputy

Voter Registration

Changes:
You can find the certificate of Late Registration under the print menu in Voter Registration.

The Voter MUST be in Late Registration status.



Ballot Audit Log

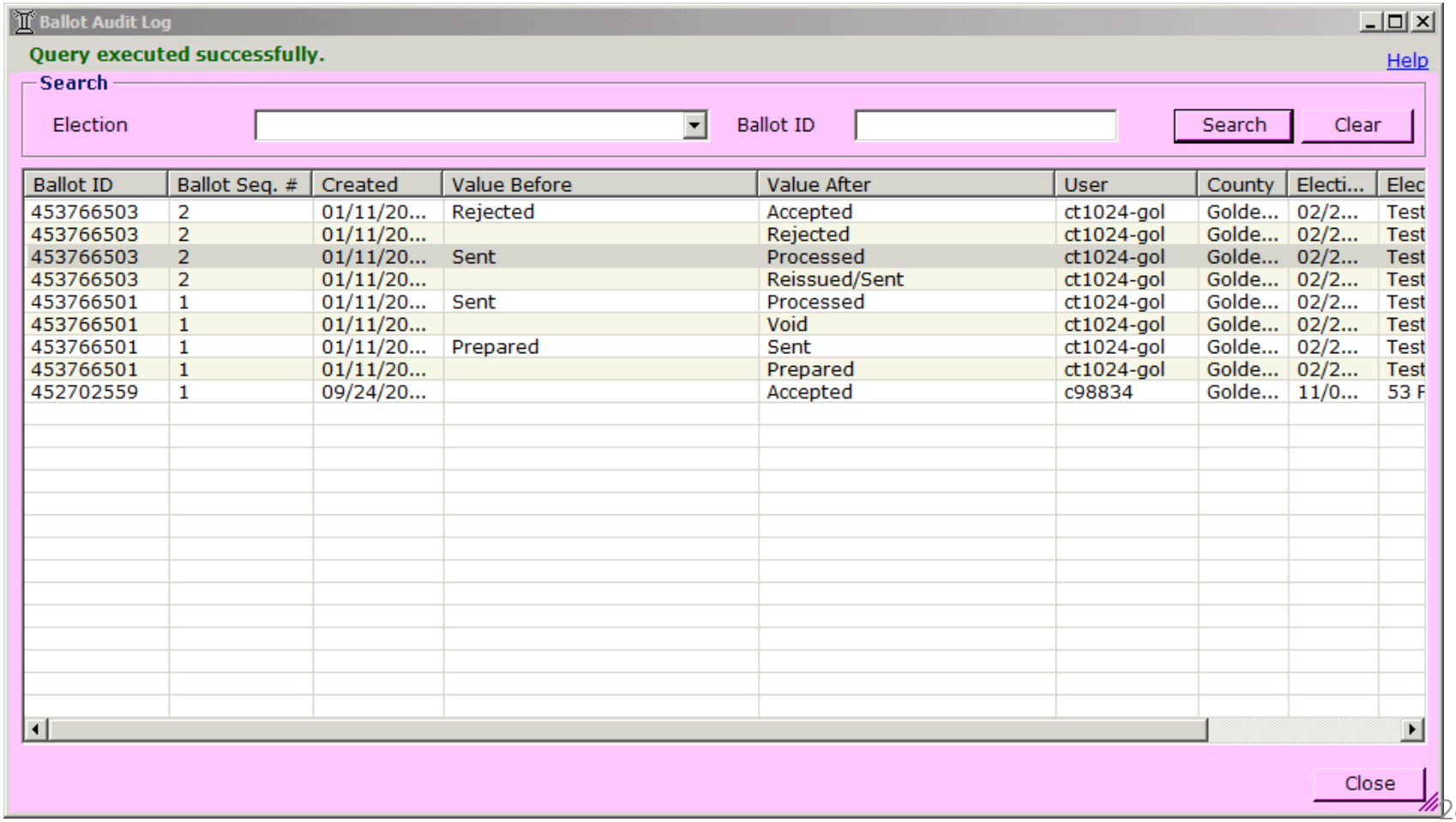
Reported Issue:

The Ballot Audit Log lacks adequate information about a ballot, and the current search features are not necessary. One big issue is that this log only appears to track certain instances of what happens to a ballot.

Ballot Audit Log

Solution:

The ballot audit log received a complete makeover. It will now track every change that a ballot goes through. You can also now search by Election OR Ballot ID.

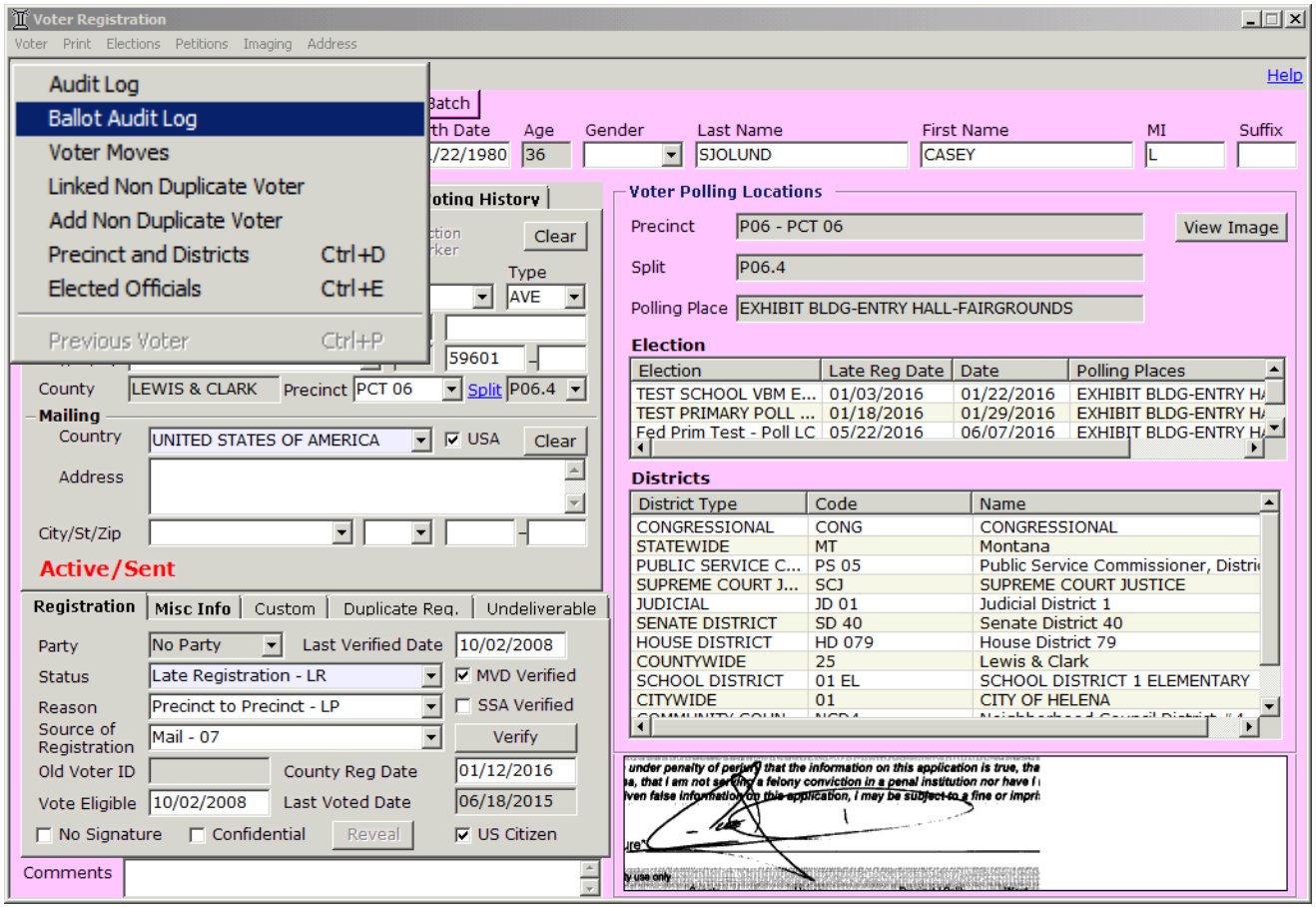


Ballot ID	Ballot Seq. #	Created	Value Before	Value After	User	County	Electi...	Elec
453766503	2	01/11/20...	Rejected	Accepted	ct1024-gol	Golde...	02/2...	Test
453766503	2	01/11/20...		Rejected	ct1024-gol	Golde...	02/2...	Test
453766503	2	01/11/20...	Sent	Processed	ct1024-gol	Golde...	02/2...	Test
453766503	2	01/11/20...		Reissued/Sent	ct1024-gol	Golde...	02/2...	Test
453766501	1	01/11/20...	Sent	Processed	ct1024-gol	Golde...	02/2...	Test
453766501	1	01/11/20...		Void	ct1024-gol	Golde...	02/2...	Test
453766501	1	01/11/20...	Prepared	Sent	ct1024-gol	Golde...	02/2...	Test
453766501	1	01/11/20...		Prepared	ct1024-gol	Golde...	02/2...	Test
452702559	1	09/24/20...		Accepted	c98834	Golde...	11/0...	53 F

Ballot Audit Log

Solution:

You can access the ballot through the voter record under the Voter Menu item.



Absentee Tab

Situation:

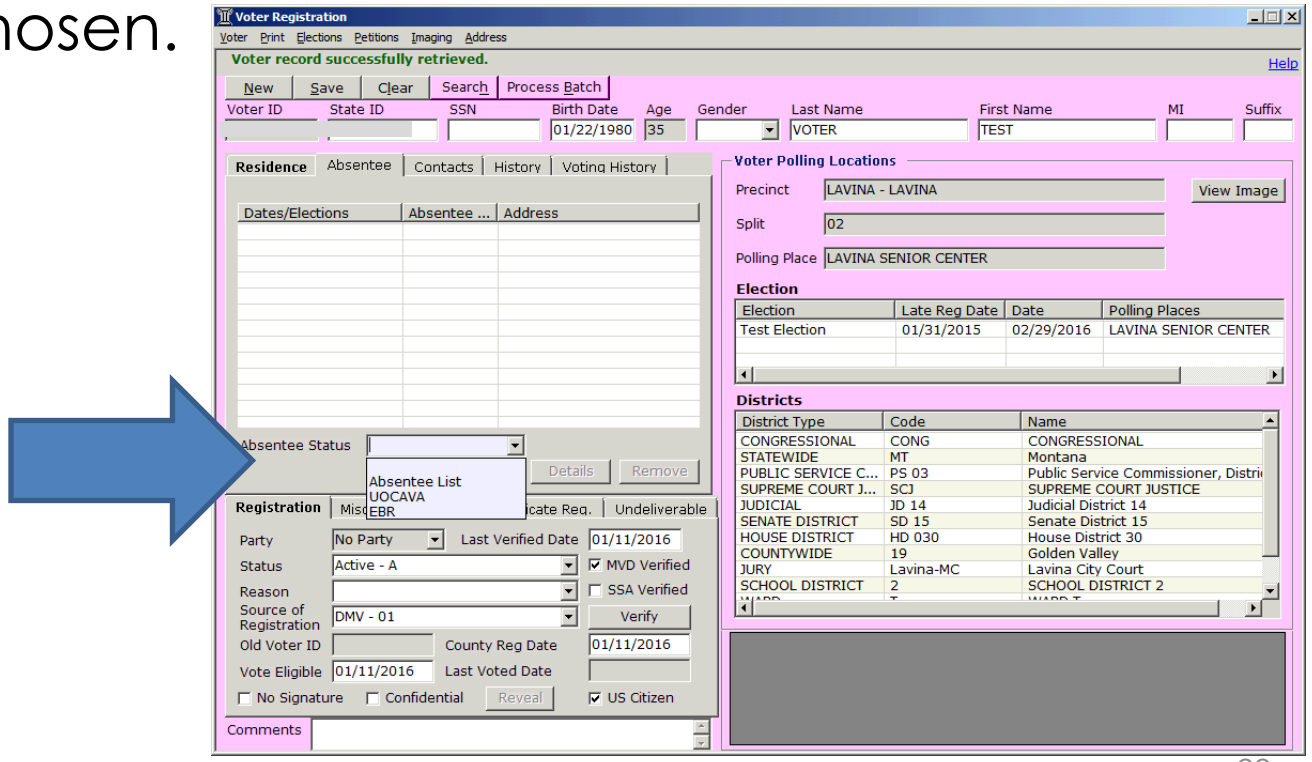
In September of 2015, EBR (electronic ballot request) Absentee Status was added to MT Votes for electronic ballots for voters with disabilities. At the time, Absentee Status was only required for EBR voters.

Absentee Tab

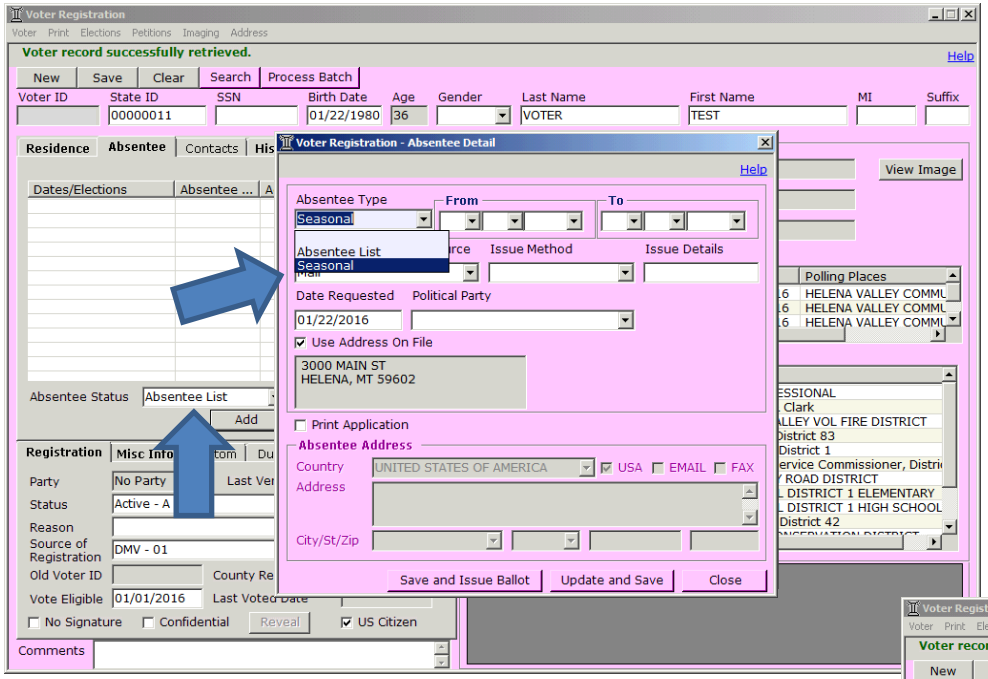
Solution:

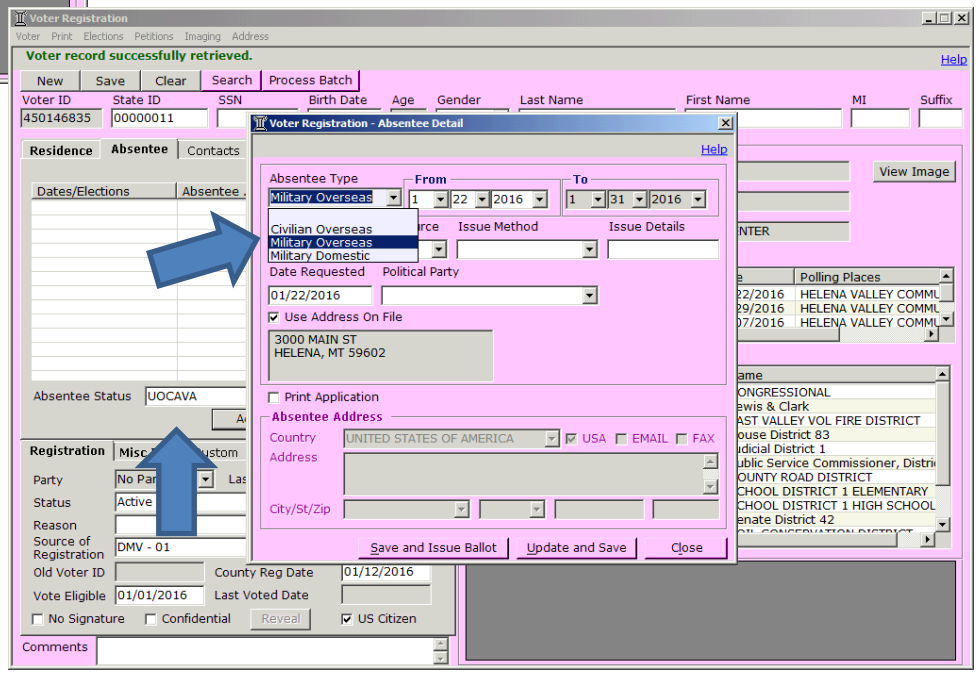
To standardize the absentee process, users are now required to select an Absentee Status to add anything other than an Election Specific request.

Absentee Types are now directly related to the Absentee Status that is chosen.



Absentee Tab





Examples of adding a Absentee List, Absentee Status and a UOCAVA Absentee Status.

Absentee Tab

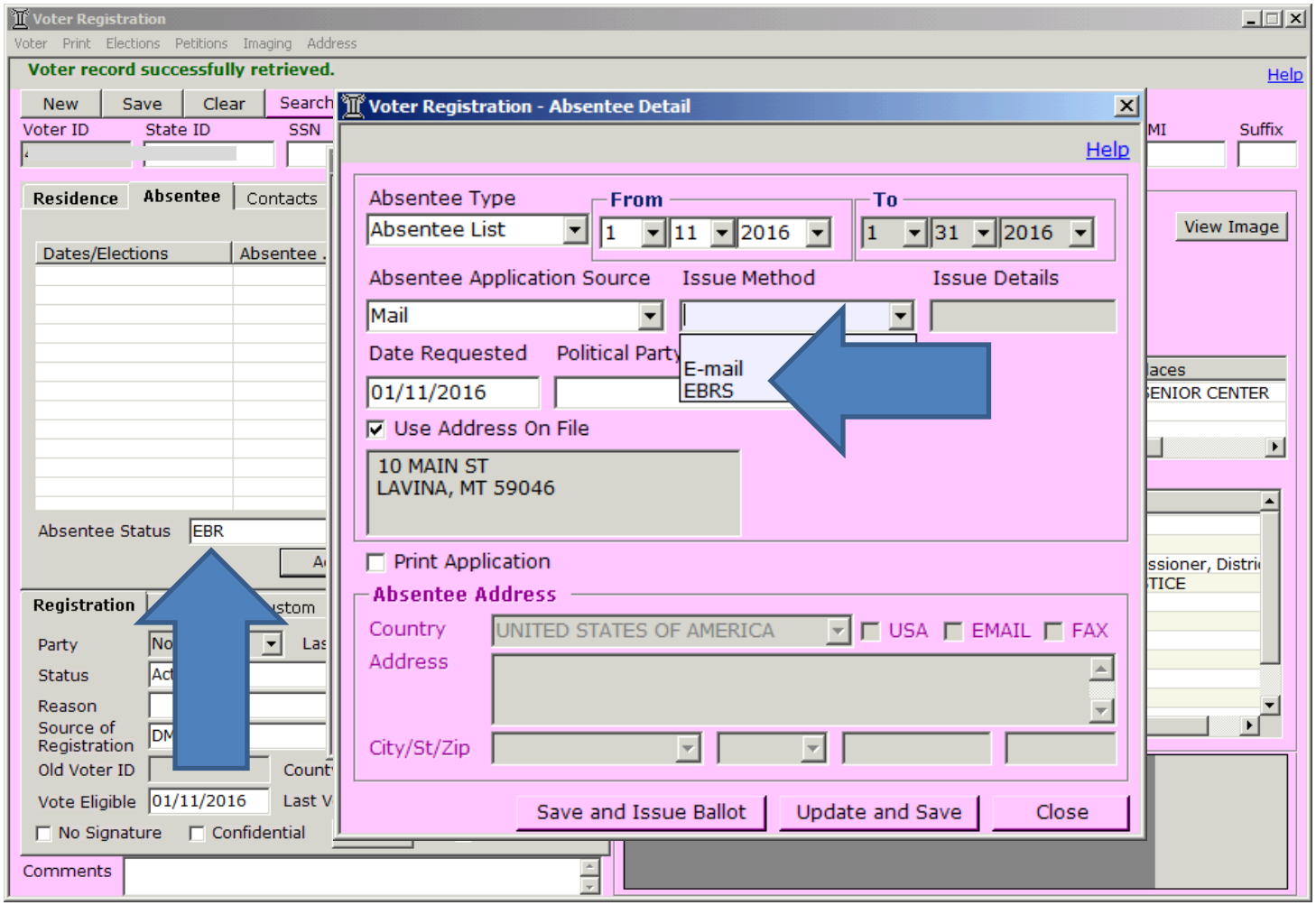
Reported Issue:

The EBR Absentee Status allowed a user to select any type of issue method.

Absentee Tab

Solution:

The user can now only select between email and EBRS as the issue method for EBR Absentee Status.



Election Management

Election Management

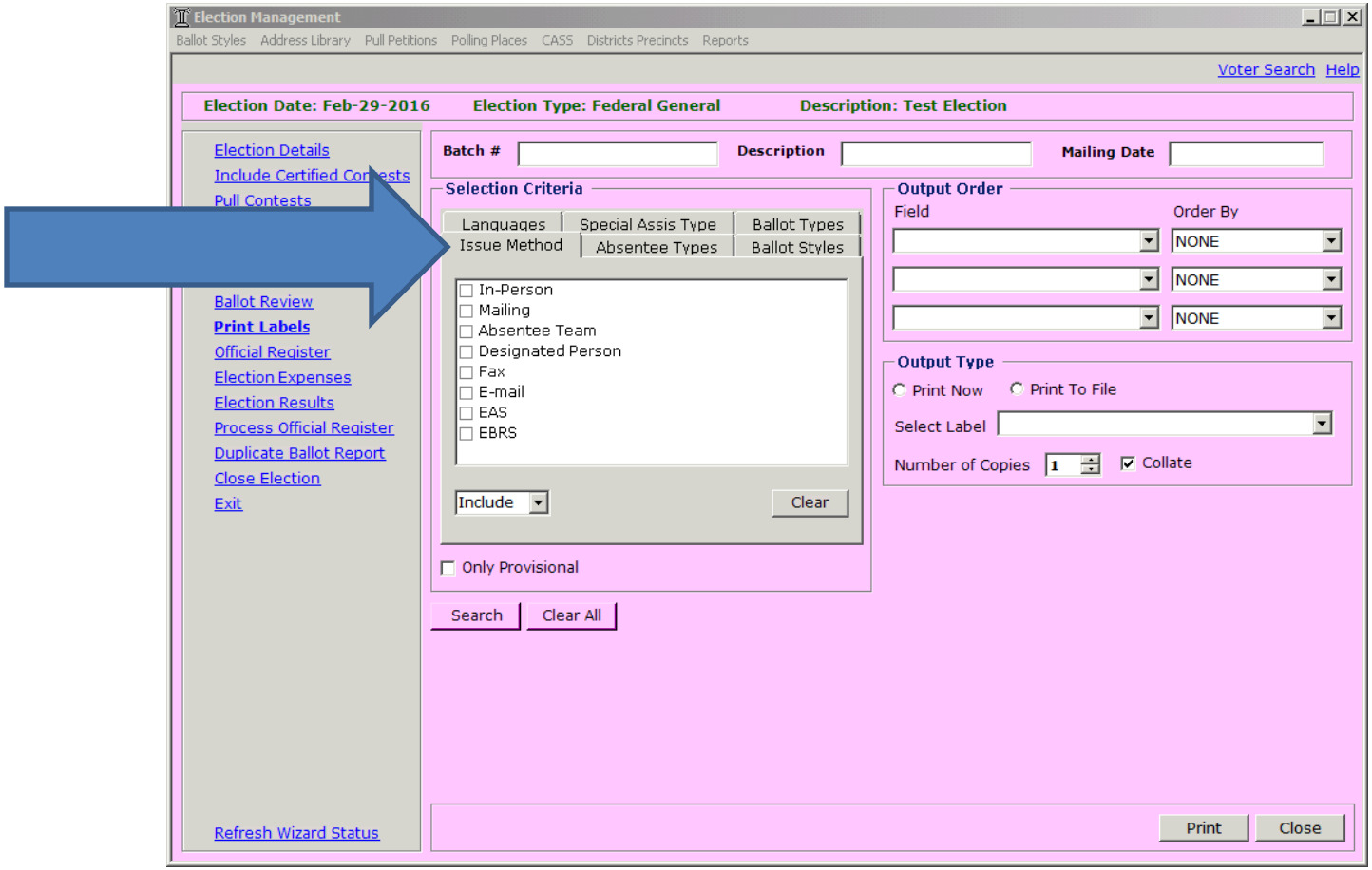
Reported Issue:

Since EBR is an Absentee Status, they can have an absentee type of 'Absentee List'. This means EBR voters would be pulled into the election with all of your Absentee List individuals, and their labels would be mixed in when you print labels, making it difficult to identify the EBR absentees.

Election Management

Solution:

You can now sort your label batch by Issue Method, which will allow you to quickly sort out your EBRS/Email ballots.



Election Management

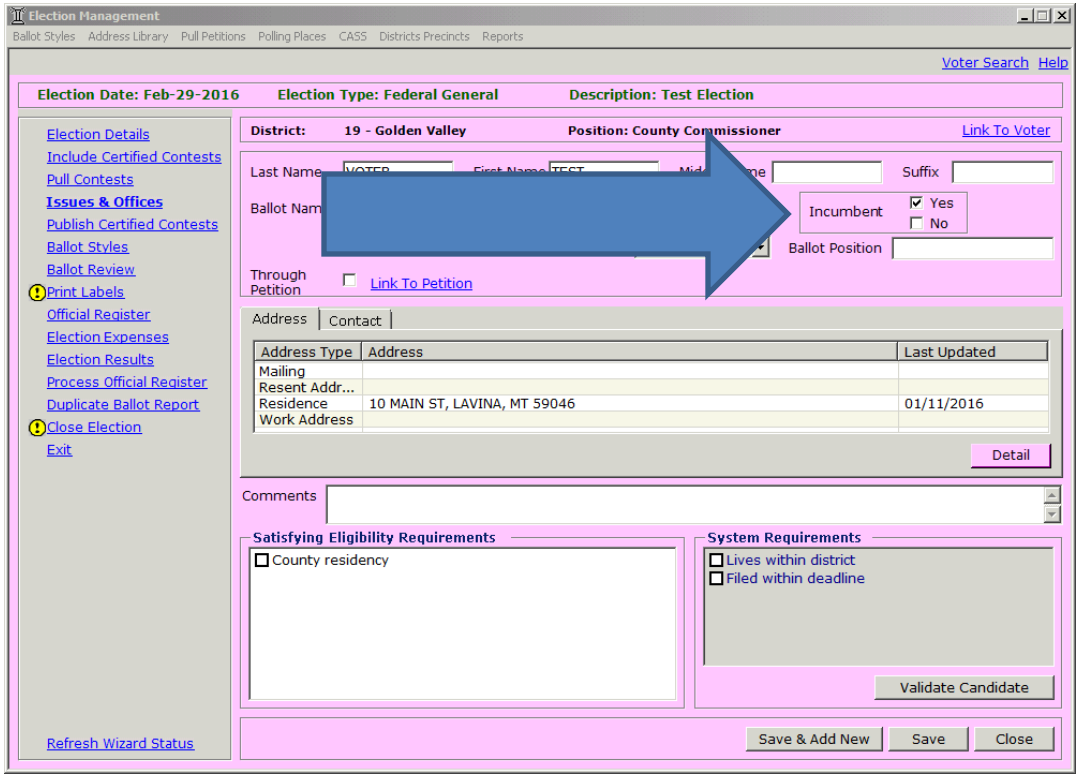
Reported Issue:

When the SOS extracted candidate information out of MT Votes for eSERS and ES&S, we could not determine which judicial candidates should have retention language. (Judicial candidates who are incumbents running unopposed require special retention language on the ballot.)

Election Management

Solution:

Add a required field of Incumbent when you enter candidates into MT Votes. The check box for incumbent was always there, but was not required. Now, you must select Yes or No.



Official Register

Reported Issue:

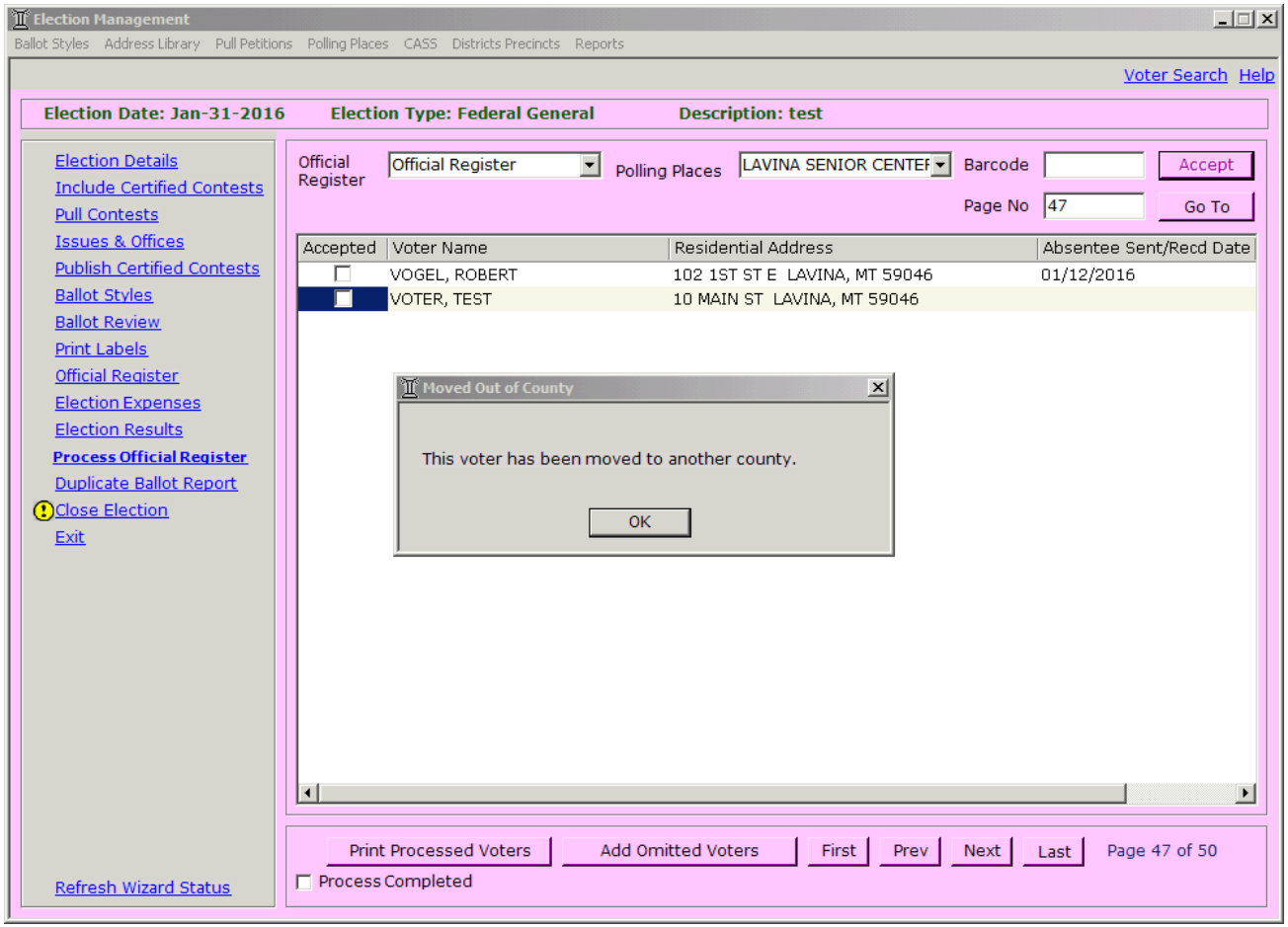
County A had printed their official registers. Two voters from that county then moved to County B and late registered. County A printed their supplemental registers which included these two voters as deletions. County A wrote **Deleted** on the signature line. The temporary workers thought that 'Deleted' was a signature and processed them as voted.

These two voters appeared to have voting history in two different counties even though they only voted in one county.

Official Register

Solution:

When processing the official register, you now will receive a notification if you try to process a voter who has moved out of your county.



Provisional Ballot Module

Provisional Ballot Module

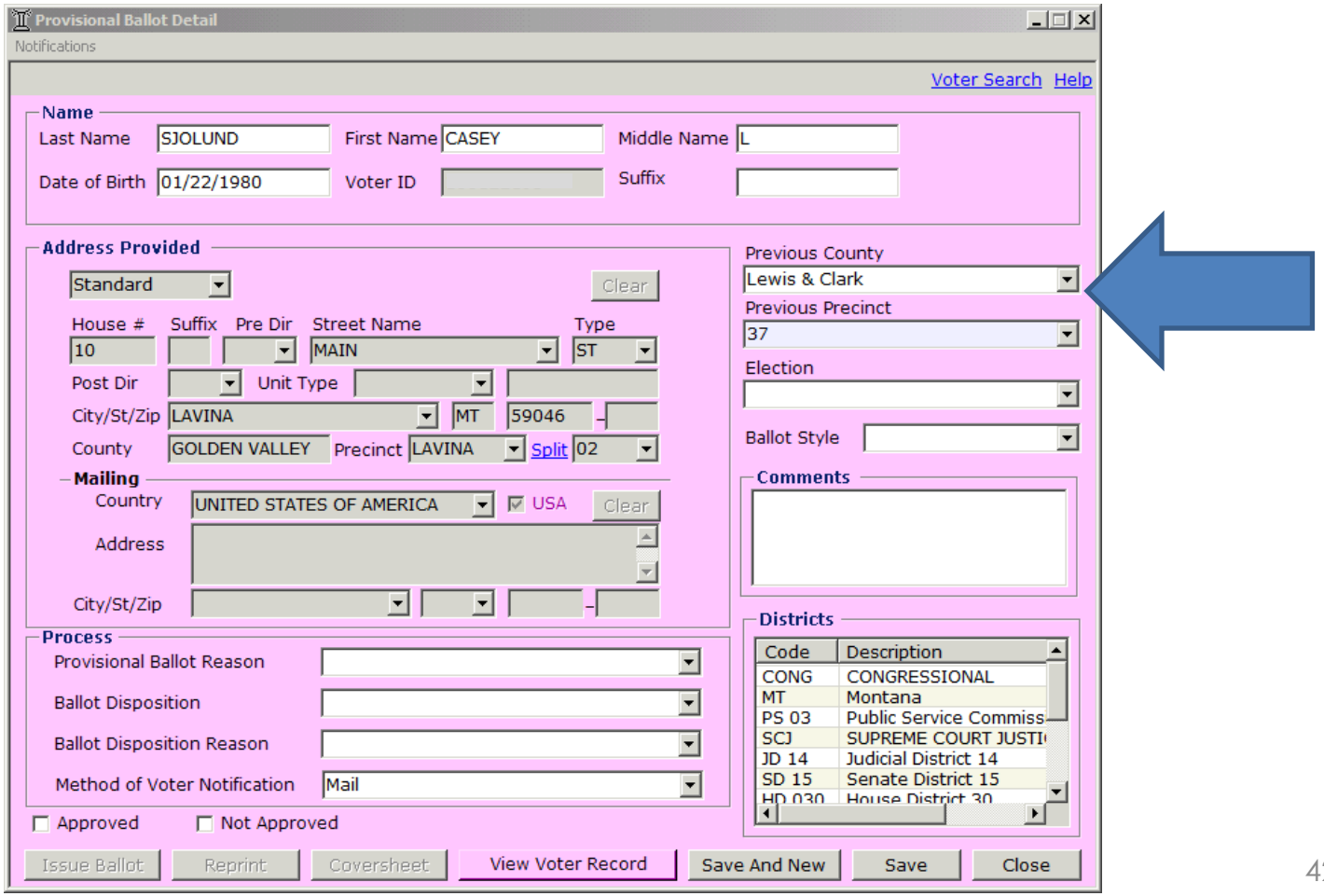
Reported Issue:

All counties do not consistently enter Previous County and Previous Precinct in the Provisional Ballot Module, which made it very difficult for other counties to Approve/Not Approve provisional voters from their county.

Provisional Ballot Module

Solution:

As long as voters have a Late Registration status and a reason of County to County or Precinct to Precinct, that data will now autofill in the provisional module.



Provisional Ballot Module

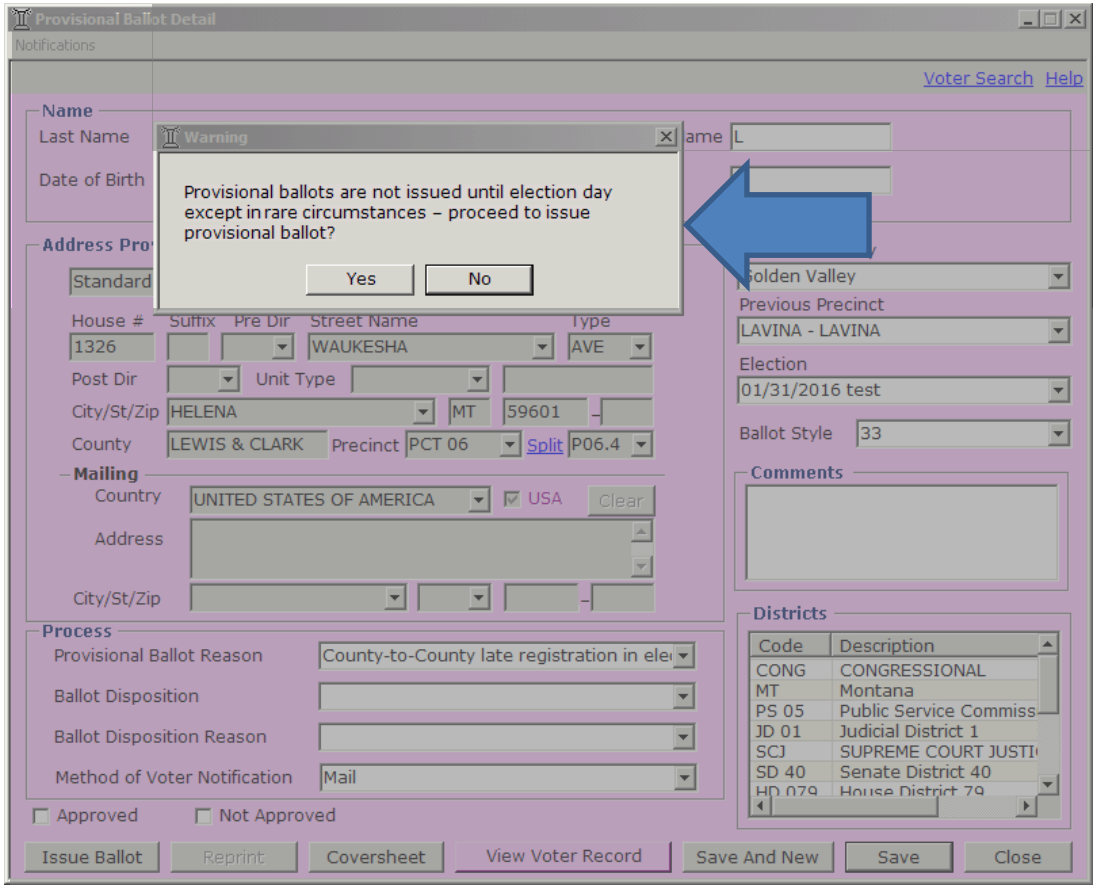
Reported Issue:

Some counties were unnecessarily issuing provisional ballots for late registrants before election day.

Provisional Ballot Module

Solution:

If you attempt to issue a provisional ballot before election day, you will be prompted with a pop-up notifying the user that in most cases provisional ballots are only issued on election day. (You can still issue the provisonal ballot if it is necessary.)



Ballot Processing

Undeliverable Ballots

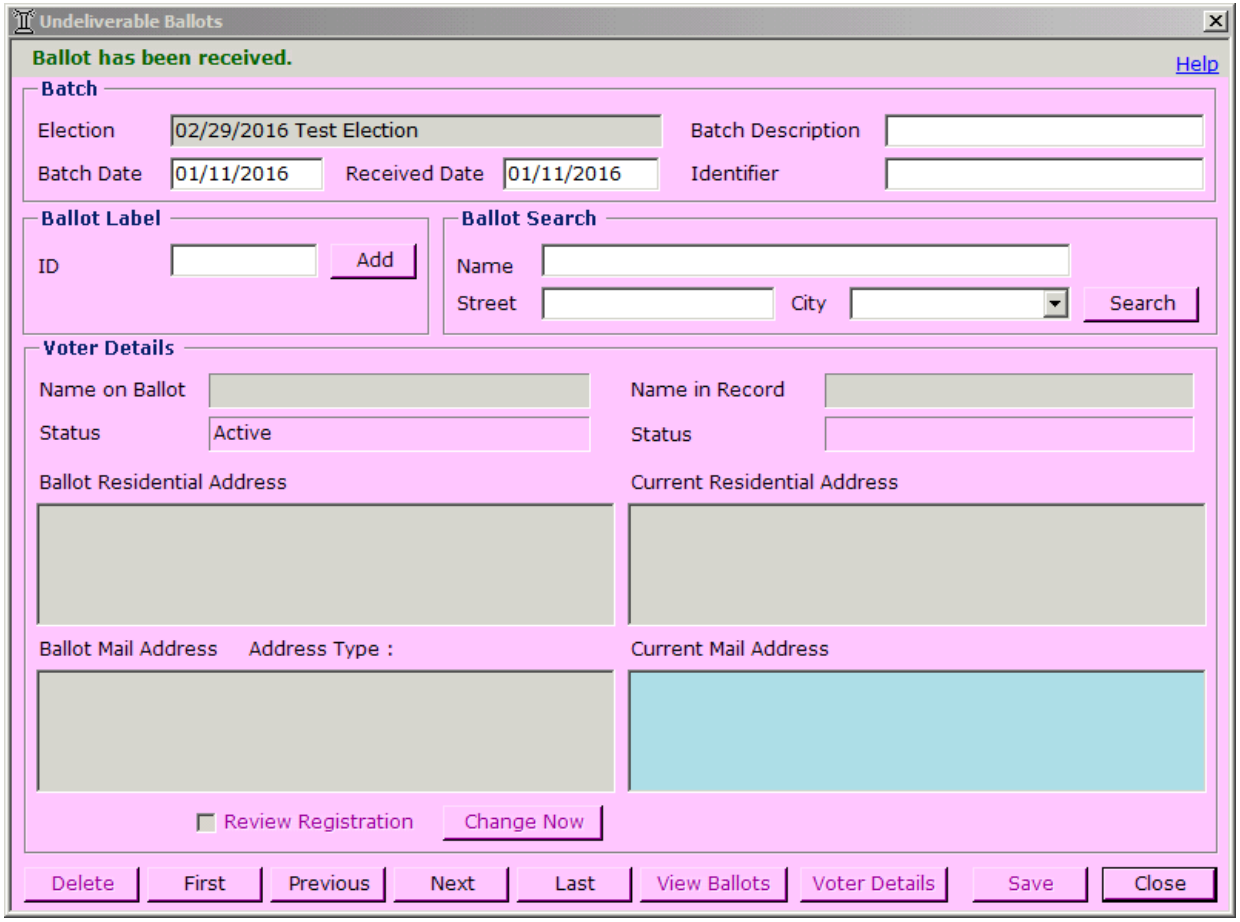
Reported Issue:

It was possible to inactivate voters from the Undeliverable Ballot Screen, even though the voter had to be sent a forwardable notice before being inactivated.

Undeliverable Ballots

Solution:

That checkbox has been removed to ensure that no voters are inactivated due to an undeliverable ballot without going through the NVRA confirmation process.



Reports & Labels

Reports & Labels

Reported Issue:

If you reissued a ballot to a voter due to a residential address change, the EX-E01 and the E-001Reports/Extracts in MT Votes showed the new address for both ballots.

Reports & Labels

Solution:

Fix these two reports to show the correct addresses for each ballot.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	VoterID	Tracking No	District/Precinct Name	BallotID	RegistrantName	DOB	Residential Address	Ballot Sent	Ballot Received	Precinct Code	Split	Ballot Style	Voter S
2	[redacted]	2	PCT 19	453766751	VOTER,TEST	1/22/1980	3000 MAIN ST, HELENA, MT 59602	1/12/2016		P19	P19.3	20	Active
3	[redacted]	1	PCT 06	453766750	VOTER,TEST	1/22/1980	1326 WAUKESHA AVE, HELENA, MT 59601	1/12/2016		P06	P06.4	33	Active
4													
5													

Ballot Style **Ballot Stage/Status** **Tracking Number** **Registrant Name/Designated Person** **Precinct** **Ballot Sent**
Ballot Number **Ballot Status Reason** **Voter ID** **Date of Birth** **Split** **Ballot Received**
Ballot ID **Ballot Type** **Voter Status** **Residential Address** **Party**
Absentee Type **Ballot Issue Reason** **Reason** **Send To**
Resent Address **Resent Date**
Comments

Precinct **PCT 06**

33	Sent/Void	1	VOTER,TEST	P06	01/12/2016
1		[redacted]	01/22/1980	P06.4	
453766750	Original	Active	1326 WAUKESHA AVE, HELENA, MT 59601	No Party	
Election Specific			1326 WAUKESHA AVE , HELENA MT 59601		
20	Sent	2	VOTER,TEST	P19	01/12/2016
1		[redacted]	01/22/1980	P19.3	
453766751	Reissued	Active	3000 MAIN ST, HELENA, MT 59602	No Party	
Election Specific			3000 MAIN ST , HELENA MT 59602		

Reports & Labels

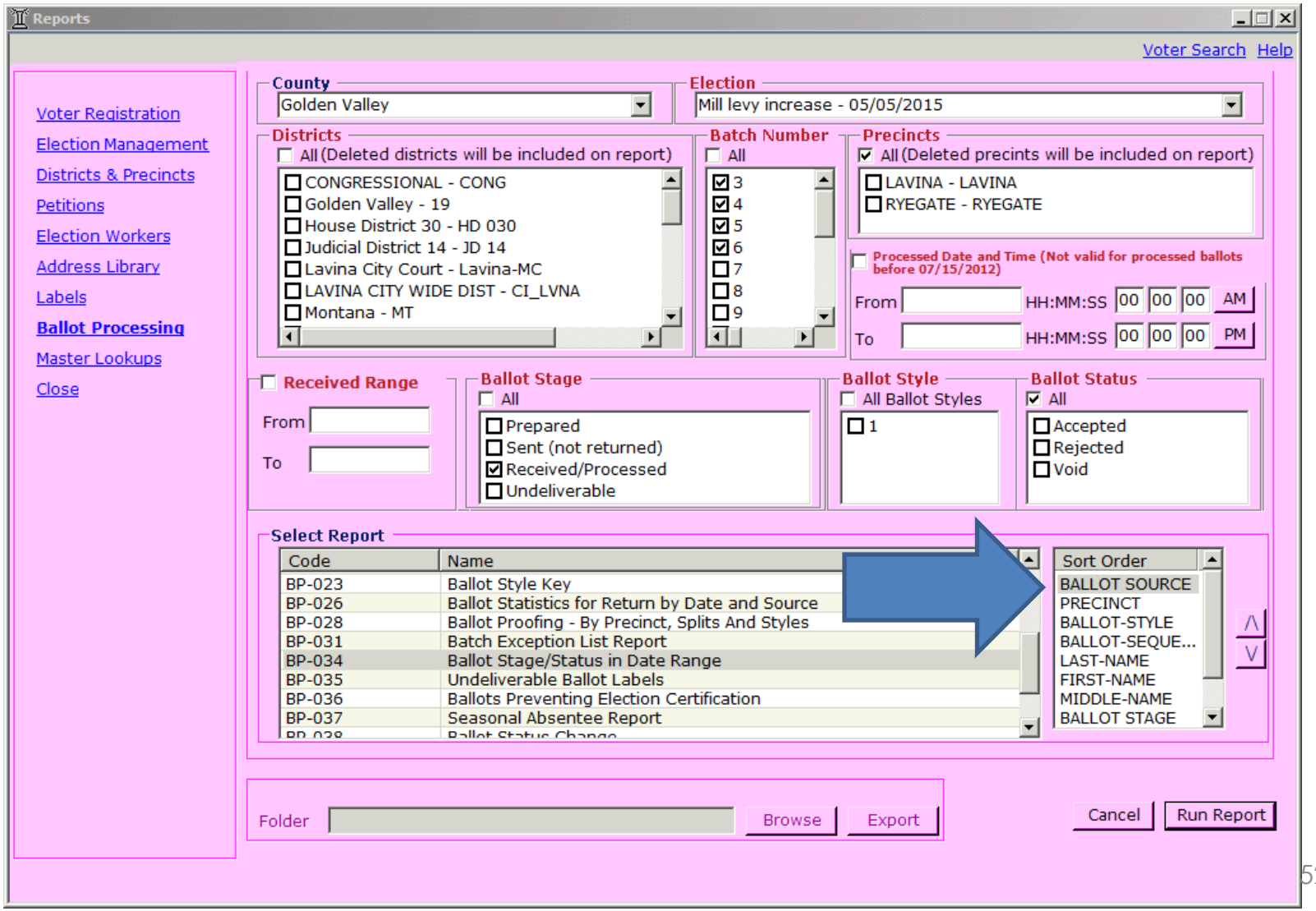
Reported Issue:

Counties requested that the Ballot Source be added as a sort option on the BP-034 Report.

Reports & Labels

Solution:

The BP-034 can now be sorted by Ballot Source.



Coming later this month

Currently, if a new or transfer voter's driver's license number does not verify in MT Votes, or if the ID# is a partial SSN you have to leave MT Votes and go to another web service to verify the ID number.

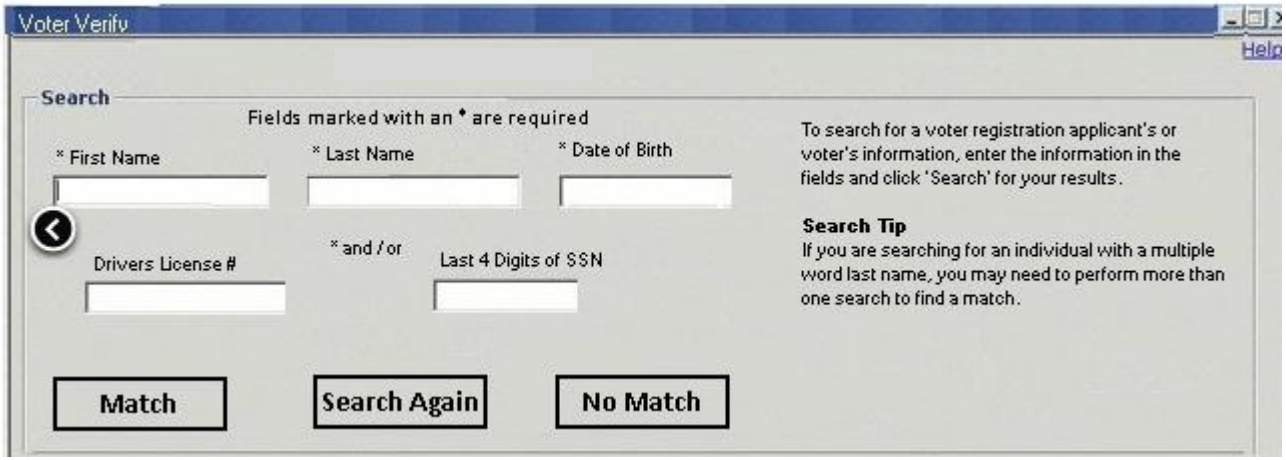
The voter verify system has been incorporated into MT Votes. Now, if a voter's driver's license number does not verify through the internal MT Votes check, or if the ID# is a partial SSN, a web service will automatically run the voter verify check.

You do not leave MT Votes for this service. You can run multiple variations in the search like you do now.

You can also access the voter verify service from the MT Votes home screen menu if necessary, rather than from the voter's record.

Coming later this month

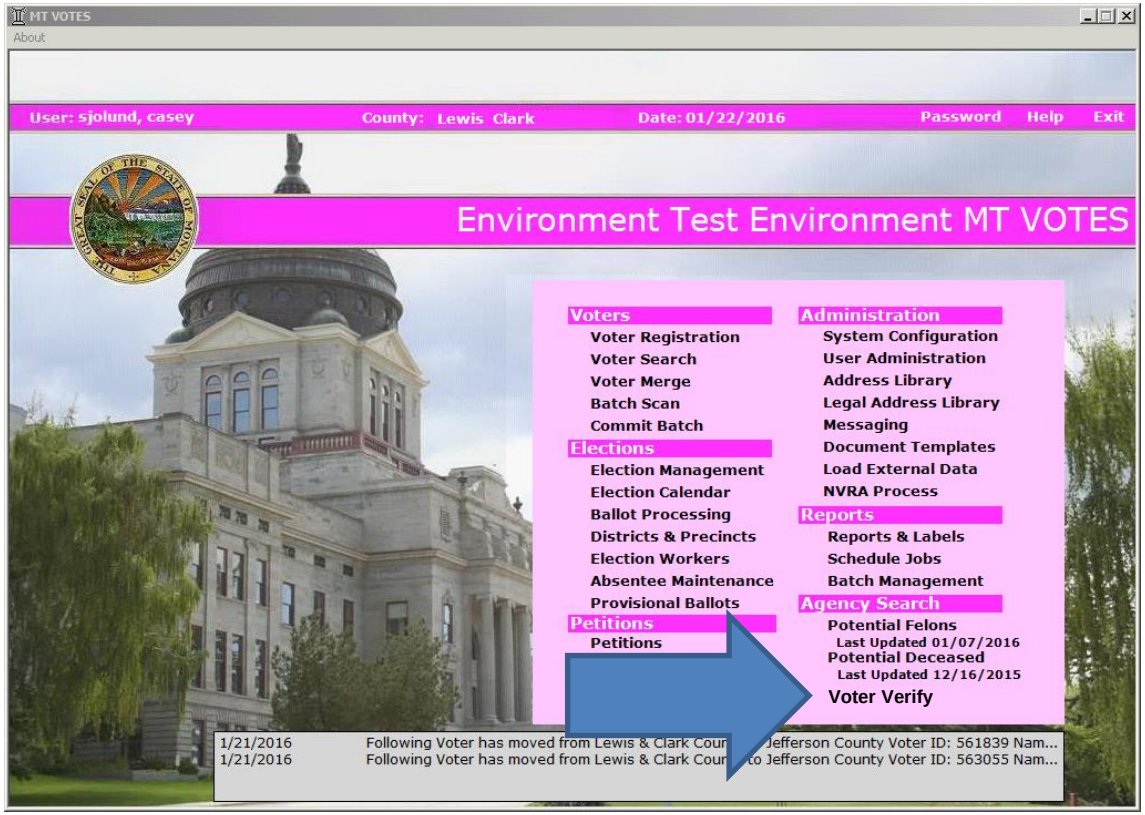
If MT Votes can not automatically verify the voter, you will be prompted with a Verification search box, much like our current Voter Verify process. The search box will allow you to enter new data and **Search Again**, exit the search through the **No Match** button and select the record as a **Match** if the information is verified.



Coming later this month

You will be able to access a stand-alone Voter Verify Module from the MT Votes home screen under the Agency Search.

Using this module will not change a voter record, it will only notify you if the information you enter is verified.



January 2016 Release

You can see all items and that were in this release by going to the About > Release Notes Section of MT Votes.

THANK YOU!

METAC is a **big** time commitment. We really appreciate all of the effort put forward by each member of METAC. We know it's not always a fun and easy process.

Audrey, Bonnie, Bret, Charlotte, Jody, Kathie, Sandi and Vickie, **Thank you!**